

# CareerTech Information Management System (CTIMS)

## EDI Invoice Process Guidebook

IMD

*career***tech**

Revised August 27, 2019

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## EDI Contacts

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**NOTE:** For questions about specific EDI requirements or what content you need to input or attach with your worksheet, contact your ODCTE Regional Coordinator.

If you have questions about submitting information in CTIMS, please contact CTIMS Support at [CTIMSSupport@careertech.ok.gov](mailto:CTIMSSupport@careertech.ok.gov).

## Help and Troubleshooting

If you do not have a CTIMS account set up or are having trouble with the navigation or software, contact CTIMSSupport@careertech.ok.gov. Send a message describing your problem. Include your school name and your telephone number and we will contact you.

If you have forgotten your password, click the **Forgot your password?** link to reset.

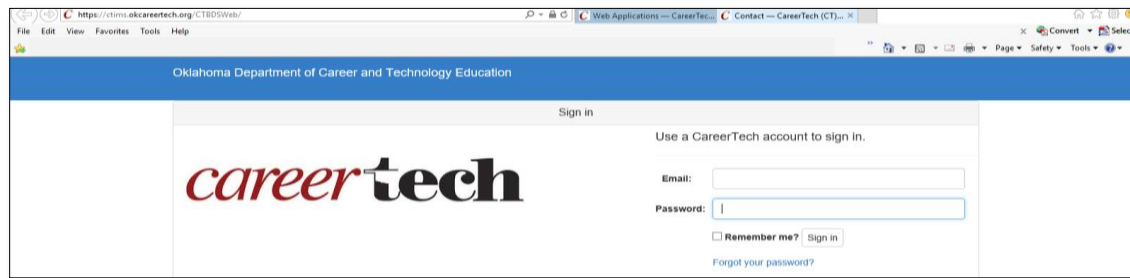
For helpful tips, see the [Tips and Tricks](#) section of this document.

### IMPORTANT:

Please log into CTIMS using Microsoft Explorer version 11 or higher. CTIMS is currently not compatible with other browsers.

## Logging into CTIMS

Sign in using your school email and CTIMS password at <https://ctims.okcareertech.org/CTBDSWeb>

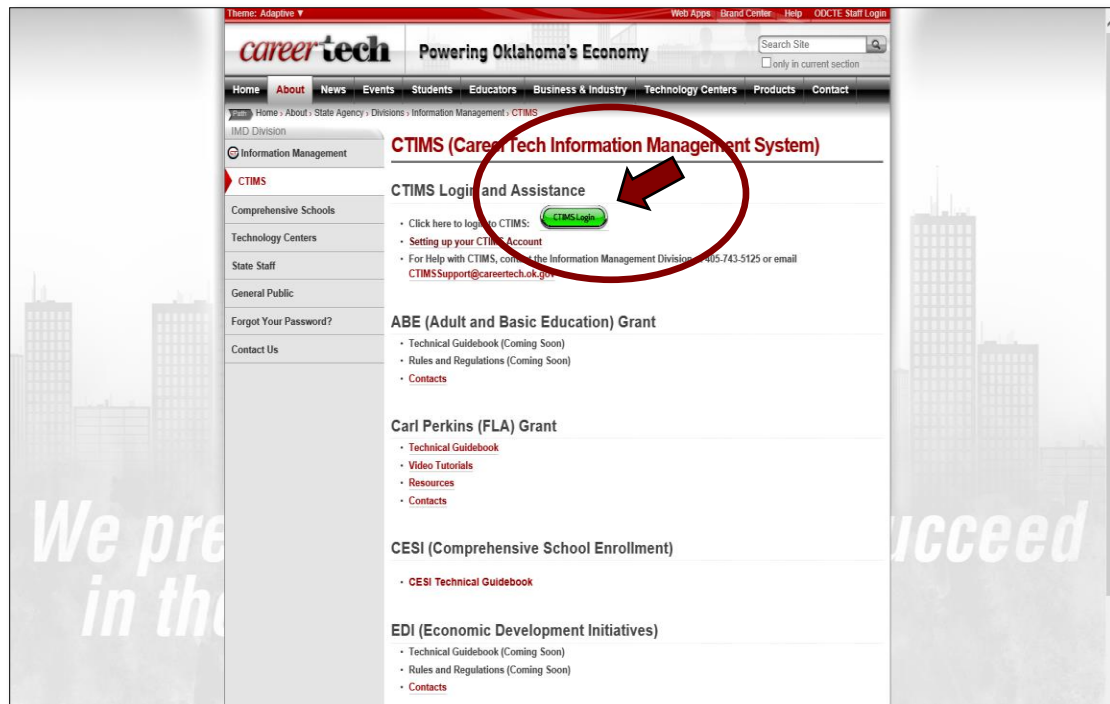


Or,

Go to <http://www.okcareertech.org/> and select **CTIMS** in the red bar at the top of the page. Do not select the ODCTE Staff Login selection in the red bar. This is not the CTIMS login.



On the CTIMS website, select the green **CTIMS Login** button.



## Invoice Process

### Invoice Submission & Approval Process

**NOTE:** For more information on funding and reimbursement, please refer to the Reimbursement Checklist on page 19 of the BIS Guidelines FY20.

<https://www.okcareertech.org/about/state-agency/divisions/imd/ctims>

#### Roles: Invoice Process

The roles represent the stages required in CTIMS for the submission of an invoice.

**Stage 1 - Local Coordinator** – Initiates the invoice process



**Stage 2 - Local BIS Director**



**Stage 3 - Local Finance Coordinator**



**Stage 4 - State Regional Coordinator**



**Stage 5 - State Requisition Coordinator** - Will verify the invoices, print the documentation and deliver to The finance department.



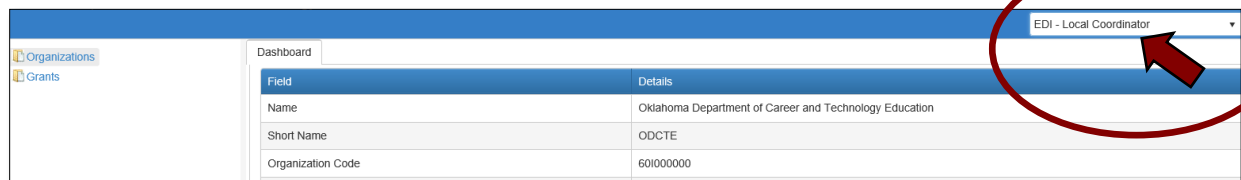
**Stage 6 -ODCTE EDI Finance Reviewer** - This is final approval to pay the claim.

## Stage 1- Local Coordinator

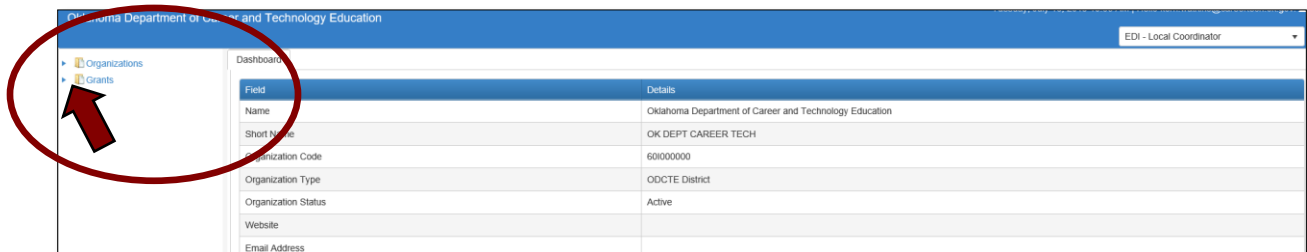
### Accessing the Invoice

After the school is done with training, the **EDI Local Coordinator** starts the **EDI Invoice Process**.

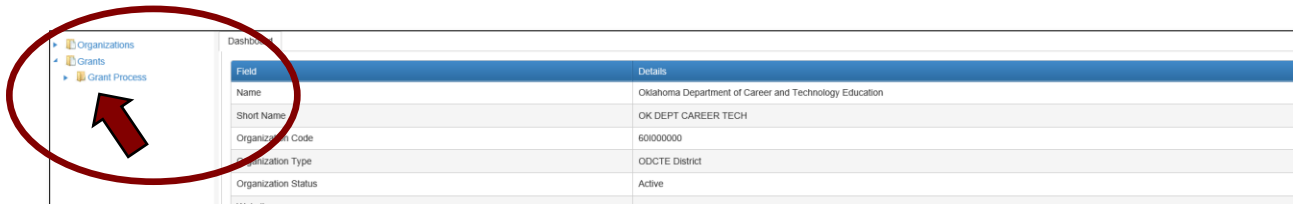
- Sign in at <https://ctims.okcareertech.org/CTBDSWeb/> using your school email and CTIMS password.
- Verify that you are signed in with the role of an **EDI Local Coordinator** in the top right-hand corner. If not, use the drop-down arrow to select the correct role.



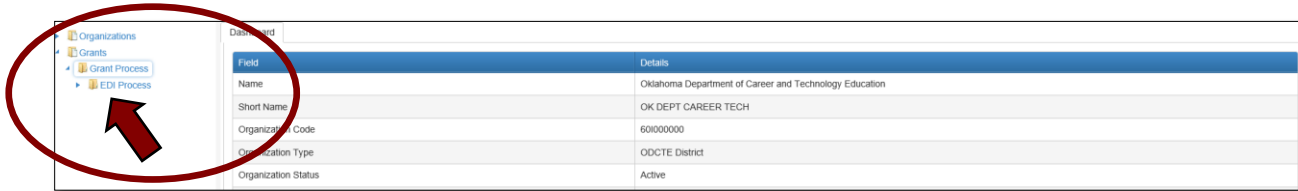
- Click the arrow | ► next to **Grants** on left navigation.



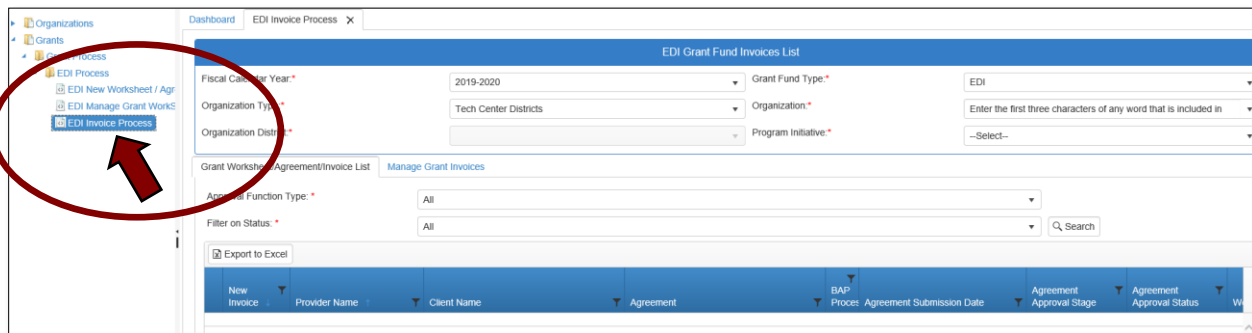
- Click the arrow | ► next to **Grant Process**.



- Click the arrow ► next to **EDI Process**.



- Select the **EDI Invoice Process**.



### Opening/Creating the Invoice

Complete the **EDI Grant Fund Invoices List** form. The tagged numbers on the screenshot correspond to the instruction steps below.

1. Verify **Fiscal Calendar Year\***.
2. Verify **Grant Fund Type** is set to **EDI\***.
3. Select your correct **Organization Type** from the drop-down menu. Should default to Tech Center Districts.
4. Select your **Organization** by typing in the first three characters of the name.
5. Verify the **Organization District\***.
6. Select a **Program Initiative\***.
7. **Approval Function Type** will remain as All.
8. **Filter on Status** will remain as All.
9. Select the **Search** button to search for any outstanding worksheets/applications that need your approval.

**NOTE:** A red asterisk (\*) indicates a required field. See next page for screen image.



Dashboard | EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up X

EDI - State Regional Coordinator

### EDI Grant Fund Worksheets List

Fiscal Calendar Year: **1** 2018-2019 Grant Fund Type: **2** EDI  
 Organization Type: **3** Tech Center Districts Organization: **4** Enter the first three characters of any word that is in  
 Organization District: **5** Program Initiative: **6** --Select--  
 Approval Function Type: **7** All  
 Filter on Status: **8** All **9** Search

☒ Save changes ☐ Cancel changes

Act	Provider Name	Client Name	Worksheet Approval Current Stage	Worksheet Submission Date	Worksheet	Agreement
-----	---------------	-------------	----------------------------------	---------------------------	-----------	-----------

After clicking the **Search** button, select **New Invoice** to start the invoice process, **not the + (plus) sign.**

Oklahoma Department of Career and Technology Education

Dashboard | EDI Invoice Process X

EDI - Local BIS Coordinator

### EDI Grant Fund Invoices List

Fiscal Calendar Year: 2016-2017 Grant Fund Type: EDI  
 Organization Type: Tech Center Districts Organization: Sample Technology Center  
 Organization District: Sample Technology Center Program Initiative: Economic Development - Firefighter (Type 83)  
 Grant Worksheet/Agreement/Invoice List Manage Grant Invoices  
 Approval Function Type: All  
 Filter on Status: All Search  
 Export to Excel

New Invoice	Provider Name	Agreement	BAP	Agreement Submission Date	Agreement Approval Stage	Agreement Approval Status
<b>New Invoice</b>	Sample Technology Center	WSAG-1617-EDI-EDI-FIREFTR-444-16X1...	No	06/23/2017 10:36:24	EDI State Requir...	Fully Approved

**NOTE:** To open an invoice that has been started, but not submitted for approval, click on the Manage Grant Invoices tab. Or, to view the approval status of an invoice already submitted, click the ► sign next to the invoice to expand that section and view details.

Grant Worksheet/Agreement/Invoice List Manage Grant Invoices

Approval Function Type: All  
 Filter on Status: All Search  
 Export to Excel

New Invoice	Provider Name	Client Name	Agreement	BAP	Agreement Submission Date	Agreement Approval Stage	Agreement Approval Status
-------------	---------------	-------------	-----------	-----	---------------------------	--------------------------	---------------------------

## EDI Grant Submit Invoice - Step 1

**1.1** - Verify that the information is correct, then select **Save & Next** to continue to the next screen.

Oklahoma Department of Career and Technology Education

EDI- Local BIS Coordinator

Grants | Grant Process | EDI Process | EDI New Worksheet / Agr | EDI Manage Grant WorkS | **EDI Invoice Process**

Dashboard | EDI Invoice Process | New Invoice

### EDI Grant Submit Invoice - Step 1

**Provider Organization Details**

Fiscal Calendar Year*	2016-2017	Grant Fund Type*	EDI
Organization Type*	Tech Center Districts	Organization*	Sample Technology Center
Organization District*	Sample Technology Center	Program Initiative*	Economic Development - Firefighter (Type 83)
Worksheet No.*	WS-1617-EDI-EDI-FIREFTR-444-16X111745-88953194C6A2		
Agreement No.*	WSAG-1617-EDI-EDI-FIREFTR-444-16X111745-741DF268EAA0		
Invoice No.*	INV-1617-EDI-EDI-FIREFTR-444-16X111745-A1331C725E9B		

**Basic Client Information**

**Project Details**

## EDI Grant Submit Invoice - Step 2

**2.1** - Under the **Invoice Line Items** tab, select the budget line item you want to invoice by clicking on the checkbox next to the line item. This will add a check mark in the box next to that line item.

Oklahoma Department of Career and Technology Education

EDI- Local BIS Coordinator

Grants | Grant Process | EDI Process | EDI New Worksheet / Agr | EDI Manage Grant WorkS | **EDI Invoice Process**

Dashboard | EDI Invoice Process | New Invoice

### EDI Grant Submit Invoice - Step 2

**Provider Organization Details**

**Basic Client Information**

**Project Details**

**Grant Allocation**

**Invoice Line Items**

	Agreement Line U. Desc.	Budget Line Program - Functio	OCAS Description	Units	Unit Cost	Req. Unit Type
<input checked="" type="checkbox"/>	Firefighter Workbooks	511-1000-640	511 - ABE Implementation Function-1000 -...	10.00	\$15.00	Cost Per Each
<input checked="" type="checkbox"/>	Tech Supplies	511-1000-600	511 - ABE Implementation Function-1000 -...	10.00	\$250.00	Cost Per Each

**2.2** - Use the scroll bar below the invoice items to scroll to the right to see total invoiced. Verify that the Invoice OCAS codes and the line item amounts match the OCAS report you will attach.

Oklahoma Department of Career and Technology Education

EDI- Local BIS Coordinator

Grants

Grant Process

EDI Process

EDI New Worksheet / Agr

EDI Manage Grant WorkS

EDI Invoice Process

Basic Client Information

Project Details

Grant Allocation

Invoice Line Items

Unit Cost	Req. Unit Type	Matched F...	Total	Approv Total	Avl. to Inv...	Current LI...	Total Invo...	Worksheet Budget Line De
10.00	\$15.00	Cost Per Each	\$0.00	\$150.00	\$150.00	\$150.00	\$0.00	Firefighter Workbooks
10.00	\$250.00	Cost Per Each	\$0.00	\$2,500.00	\$2,500.00	\$2,500.00	\$0.00	Tech Supplies

0.00 \$2,650.00 \$2,650.00 \$2,650.00 \$0.00 \$0.00

**2.3** - Attach the OCAS Expenditure Summary and Detailed Reports that match the amount of reimbursement you are requesting. Attach required receipts, vendor invoices, PEF's and contracts. To attach a document, use your mouse scroll button to go down to the **Attachments** section. Click the **+(plus)** sign, then click **Browse** to locate the files on your computer. Select **Upload and Save File** to attach the file. A message box will say you have successfully uploaded the file. Close this box.

OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION

FLA-Local Finance Coordinator

Basic Client Information

Project Details

Grant Allocation

Invoice Line Items

Attachments

Browse:

Attachment Note:

Upload & Save file

Active/inactive file(s) Download all files

File Name	Date	Note	Action	Detail Status
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Acknowledgements

Invoice Summary One Step Back Save as Draft Submit For Approval

**2.4** - Go to the **Acknowledgements** tab by clicking on the **+(plus)** sign to expand this section. Check the required acknowledgment boxes. Type an acknowledgment note in the box. If you don't have a note to add, type your initials, as this field is required. Then, click the **Submit for Approval** button.

Oklahoma Department of Career and Technology Education

EDI- Local BIS Coordinator

Grants

- Grant Process
- EDI Process
- EDI New Worksheet / Agr
- EDI Manage Grant WorkS
- EDI Invoice Process

Basic Client Information

Project Details

Grant Allocation

Invoice Line Items

Attachments

Acknowledgements

☒ By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note:

adc

Refresh View SOU Invoice Summary One Step Back Save as Draft Submit For Approval

**2.5** – A message will pop up to let you know that you have successfully submitted the invoice to the next approval stage. Click **OK**.

Oklahoma Department of Career and Technology Education

EDI- Local BIS Coordinator

EDI Grant Submit Invoice - Step 2

Grant Invoice

Successfully completed the current stage and going to next stage. Please wait...

OK

Provider Organization Details

Basic Client Information

Project Details

Grant Allocation

Invoice Line Items

Attachments

Acknowledgements


☒ By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note:

adc

One Step Back Save as Draft Submit For Approval

**2.6** - Go to the **Invoice Summary** tab to print a pdf report of the claim you have submitted.

**2.7** - Click on the  symbol to download a pdf of your invoice.

The Invoice has been successfully submitted and will go to the **EDI Local BIS Director**.

## Making Changes to an Invoice

### Changes to Invoices before Submitting for Approval

- If you need to make changes to an amount on an invoice that has already been created, but not submitted for approval, go to the invoice by clicking on the **Manage Invoices** tab on the **EDI Grant Fund Invoices List** screen and click on the Invoice Number in the Invoice column.

- Click Next Step to get to the EDI Grant Submit Invoice- Step 2 screen, then expand the **Budget Line** section, and click on the **Edit** button. Change the dollar amount in the **Unit Cost** column to change the **Total to be Invoiced** column amount. Click **Update** to complete the edit.
- When you've made all the necessary changes, you can click **Save as Draft**, then **Submit for Approval**.

### Changes to Invoices after Submitting for Approval

- To make changes to an invoice after it has been submitted for approval, you will need to do a change request in the invoice. Open the invoice to be changed using the steps mentioned above in the **Accessing the Invoice** section. At the bottom right of the screen (you may need to use the scroll bar at the bottom) click **Change Request**.

Budget Line (OCAS CODE)	Function - Object - Program	OCAS Description	Units	Unit Cost	Req. Unit Type	Matched Funds	Total	Approv
1500-610-590		1500-General Supplies-610-General Suppl...	20.00	\$40.00	Cost Per Hour	\$0.00	\$800.00	\$800.00
1500-610-590		1500-General Supplies-610-General Suppl...	12.00	\$40.00	Cost Per Hour	\$0.00	\$480.00	\$480.00
1500-610-590		1500-General Supplies-610-General Suppl...	10.00	\$40.00	Cost Per Hour	\$0.00	\$400.00	\$400.00
1500-610-590		1500-General Supplies-610-General Suppl...	5.00	\$40.00	Cost Per Hour	\$0.00	\$200.00	\$200.00
1500-610-590		1500-General Supplies-610-General Suppl...	10.00	\$40.00	Cost Per Hour	\$0.00	\$400.00	\$400.00
1500-610-590		1500-General Supplies-610-General Suppl...	5.00	\$40.00	Cost Per Hour	\$0.00	\$200.00	\$200.00
1500-610-590		1500-General Supplies-610-General Suppl...	10.00	\$40.00	Cost Per Hour	\$0.00	\$400.00	\$400.00
1500-610-590		1500-General Supplies-610-General Suppl...	5.00	\$40.00	Cost Per Hour	\$0.00	\$200.00	\$200.00
1500-610-590		1500-General Supplies-610-General Suppl...	5.00	\$40.00	Cost Per Hour	\$0.00	\$200.00	\$200.00
1500-610-590		1500-General Supplies-610-General Suppl...	24.00	\$11.53	Cost Per Each	\$0.00	\$276.72	\$276.72
1500-610-590		1500-General Supplies-610-General Suppl...	40.00	\$40.00	Cost Per Hour	\$0.00	\$1,600.00	\$1,600.00
						\$0.00	\$15,236.72	\$15,236.72


Refresh View BIS PEF View SOU Invoice Summary One Step Back Save as Draft Submit For Approval **Change Request**

- Initiating the change request will cancel the approval process. If you are sure you would like to begin the change request click **OK** to confirm.

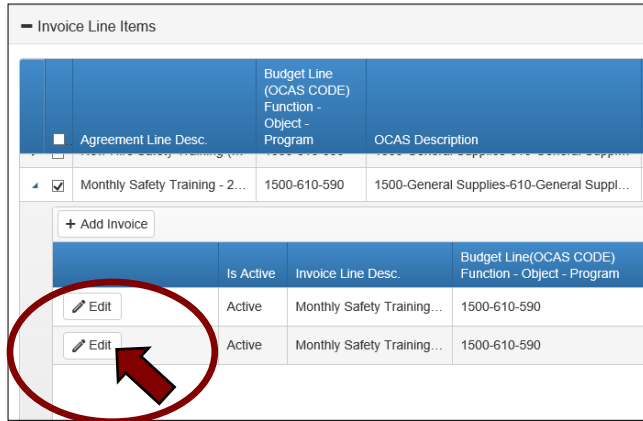
**Change Request**

You are going to cancel the approval process and initiating the change request process, Are you sure?

Cancel OK

- Click the  next to the invoice line item you need to change to expand it. Then, click the **Edit** button to make the changes.

**NOTE:** You can change the **Units**, **Unit Cost**, **Req. Unit Type**, and **Matched Funds** to change the Total and Total to be Invoiced columns.



Agreement Line Desc.	Budget Line (OCAS CODE) Function - Object - Program	OCAS Description
Monthly Safety Training - 2...	1500-610-590	1500-General Supplies-610-General Suppl...

Is Active	Invoice Line Desc.	Budget Line(OCAS CODE) Function - Object - Program
Active	Monthly Safety Training...	1500-610-590
Active	Monthly Safety Training...	1500-610-590

- At this point, you can **Save as Draft** and come back to it later if necessary, or **Submit for Approval** to send it to the next approval stage.

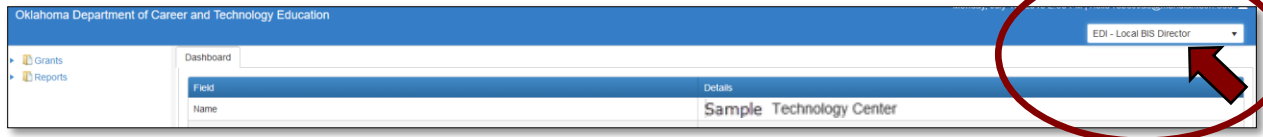
**IMPORTANT:** Changes to an Invoice can only be made by the EDI Local Coordinator. If an invoice is at the final approval stage - ODCTE Finance Reviewer, a change request is no longer an option. If you need to make a change at this stage, you will need to contact the ODCTE Finance Reviewer to request they reject the invoice. Then, you can initiate the change request.

**NOTE:** If \$0.00 are available in a line item to invoice, the line item will no longer appear on a new invoice.

## Stage 2- Local BIS Director

### Accessing the Invoice

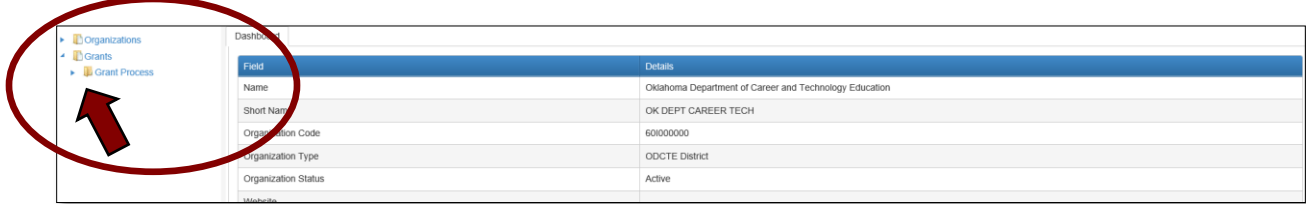
- Sign in at <https://ctims.okcareertech.org/CTBDSWeb/> using your school email and CTIMS password.
- Verify that you are signed in with the role of an **EDI Local Coordinator** in the top right-hand corner. If not, use the drop-down arrow to select the correct role.



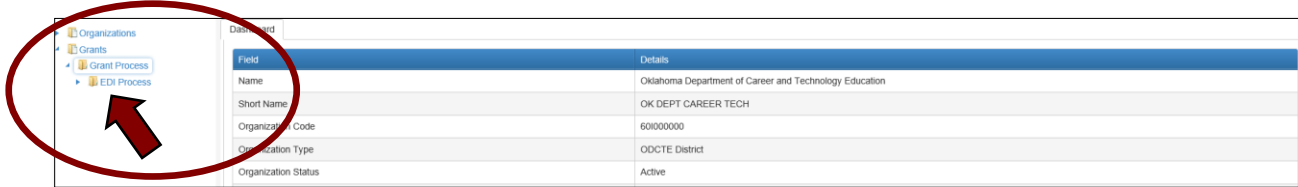
- Click the arrow ► next to **Grants** on left navigation.



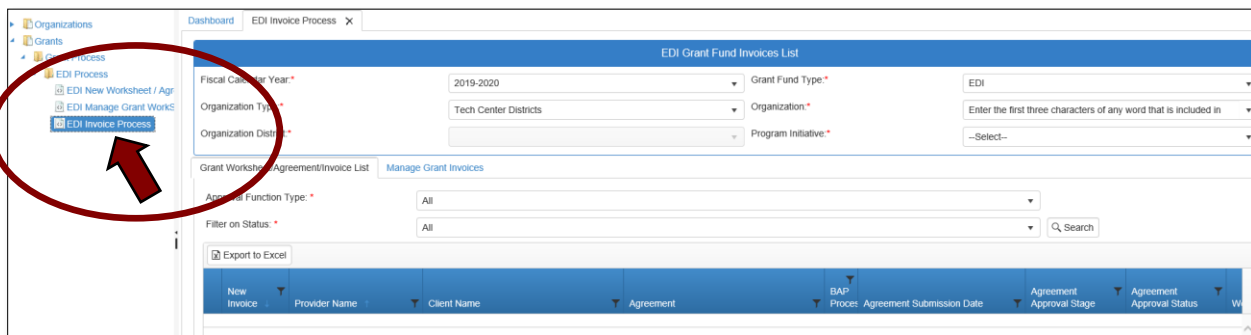
- Click the arrow ► next to **Grant Process**.



- Click the arrow ► next to **EDI Process**.



- Select the **EDI Invoice Process**.





## Opening the Invoice

- Complete the **EDI Grant Fund Invoices List** form. The tagged numbers on the screenshot correspond to the instruction steps below.
  1. Verify **Fiscal Calendar Year\***.
  2. Verify **Grant Fund Type** is set to **EDI\***.
  3. Select your correct **Organization Type** from the drop-down menu. Should default to Tech Center Districts.
  4. Select your **Organization** by typing in the first three characters of the name.
  5. Verify the **Organization District\***.
  6. Select a **Program Initiative\***.
  7. **Approval Function Type** will remain as All.
  8. **Filter on Status** will remain as All.
  9. Select the **Search** button to search for any outstanding worksheets/applications that need your approval.

**NOTE:** A red asterisk (\*) indicates a required field. See next page for screen image.

The screenshot shows the 'EDI Grant Fund Worksheets List' form. It includes several dropdown menus and a search button, each with a red circle and a number indicating a step in the process:

- 1: Fiscal Calendar Year\* (set to 2018-2019)
- 2: Grant Fund Type\* (set to EDI)
- 3: Organization Type\* (set to Tech Center Districts)
- 4: Organization\* (text input field)
- 5: Organization District\*
- 6: Program Initiative\*
- 7: Approval Function Type\* (set to All)
- 8: Filter on Status\* (set to All)
- 9: Search button

Below the form are buttons for 'Save changes', 'Cancel changes', and 'Export to Excel'. At the bottom is a table header with columns: Act, Provider Name, Client Name, Worksheet Approval Current Stage, Worksheet Submission Date, Worksheet, and Agreement.

- Click on the **Manage Grant Invoices** tab.

The screenshot shows the 'Manage Grant Invoices' tab. A red circle and arrow point to the 'Manage Grant Invoices' link in the top navigation bar. Below the link are dropdown menus for 'Approval Function Type\*' (set to All) and 'Filter on Status\*' (set to All), followed by a 'Search' button. At the bottom is a table header with columns: New Invoice, Provider Name, Client Name, Agreement, BAP Procet, Agreement Submission Date, Agreement Approval Stage, and Agreement Approval Status.

- Click on the invoice number in the Invoice column to choose the invoice to review and approve.

Dashboard | EDI Invoice Process

### EDI Grant Fund Invoices List

Fiscal Calendar Year: 2018-2019 | Grant Fund Type: EDI  
 Organization Type: Tech Center Districts | Organization: Sample Technology Center  
 Organization District: Sample Technology Center | Program Initiative: Economic Development - Training for Industry Programs (Type

Grant Worksheet/Agreement/Invoice List | Manage Grant Invoices

☒ Save changes | ☐ Cancel changes |  |

	BAP Status	Procet	Payme Days	Organization	Client Name	Program Initiative	Invoice	Invoice Last 4 Digit Reque No	Invoice Submitted On	Last App
<input type="checkbox"/>	Yes	Yes	0	Sample Technology Center	Sample Company Test Incorporated	Economic Development	INV-1819-EDI-EDI-TIP-434-16X111745-25...	15...	04/29/2019 15:11:31	EDI Loca
<input type="checkbox"/>	Yes	Yes	0	Sample Technology Center	Sample Company Test Incorporated	Economic Development	INV-1819-EDI-EDI-TIP-434-16X1...	16...	04/29/2019 00:00:00	
<input type="checkbox"/>	Yes	Yes	0	Sample Technology Center	Sample Company Test Incorporated	Economic Development	INV-1819-EDI-EDI-TIP-434-16X11174...	65...	04/29/2019 00:00:00	

**NOTE:** To view and invoice approval summary, click on the ► next to the invoice line you want to view. This summary will allow you to see the approval status and approval notes. You can also filter by the Current Approval Stage column (use the scroll bar to scroll to the right). Click on the filter icon and type in your role. This will allow you to see only the invoices you have at your approval stage.

## EDI Grant Submit Invoice Step-1

**1.1** - Review the information on the **EDI Grant Submit Invoice Step-1** screen and click **Next Step**.

Dashboard | EDI Invoice Process | INV-1819-EDI-EDI-TIP-434-16X111745-79CB797AB0D6

### EDI Grant Submit Invoice - Step 1

**Provider Organization Details**

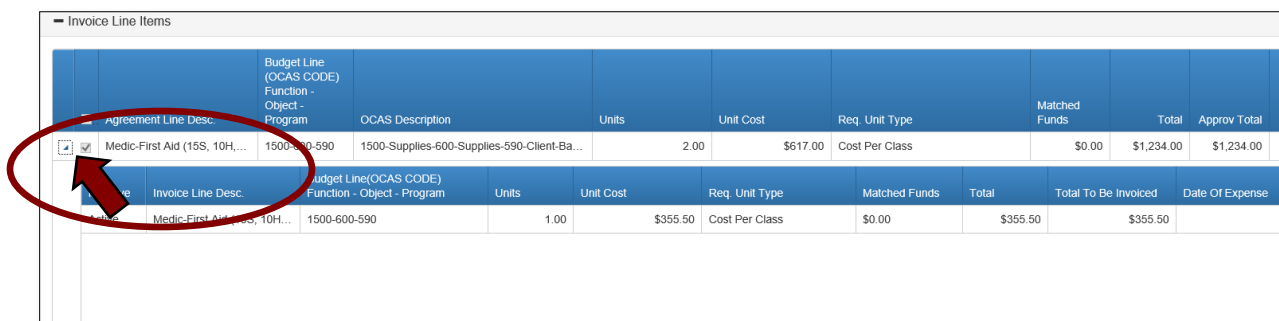
Fiscal Calendar Year: 2018-2019 | Grant Fund Type: EDI  
 Organization Type: Tech Center Districts | Organization: Sample Technology Center  
 Organization District: Sample Technology Center | Program Initiative: Economic Development - Training for Industry Programs (Typ...  
 Worksheet No: WS-1819-EDI-EDI-TIP-434-16X111745-F819ECF759A3  
 Agreement No: WSAG-1819-EDI-EDI-TIP-434-16X111745-DD198D78C5DA  
 Invoice No: INV-1819-EDI-EDI-TIP-434-16X111745-79CB797AB0D6

+ Basic Client Information  
 + Project Details

|

## EDI Grant Submit Invoice Step-2

**2.1** - Review the information on the **EDI Grant Submit Invoice Step-2** screen. You can expand the sections by clicking on the +(plus) sign. Then view the invoice details by clicking on the ► next to the agreement line.



Invoice Line Items										
Agreement Line Desc.	Budget Line (OCAS CODE) Function - Object - Program	OCAS Description	Units	Unit Cost	Req. Unit Type	Matched Funds	Total	Approv Total		
Medic-First Aid (15S, 10H,...	1500-600-590	1500-Supplies-600-Supplies-590-Client-Ba...	2.00	\$617.00	Cost Per Class	\$0.00	\$1,234.00	\$1,234.00		
Invoice Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	Units	Unit Cost	Req. Unit Type	Matched Funds	Total	Total To Be Invoiced	Date Of Expense		
Medic-First Aid (15S, 10H,...	1500-600-590	1.00	\$355.50	Cost Per Class	\$0.00	\$355.50	\$355.50			

**2.2** – Click **Submit for Approval**. The invoice will now go to the next approval stage.

### Stage 3-Local Finance Coordinator

Follow the steps for the Local BIS Coordinator to complete this approval stage. Make sure you are logged into CTIMS using the EDI Local Finance Coordinator Role.

### Stage 4-State Regional Coordinator

Follow the steps for the Local BIS Coordinator to complete this approval stage. Make sure you are logged into CTIMS using the EDI State Regional Coordinator Role.

### Stage 5-State Requisition Coordinator

Follow the steps for the Local BIS Coordinator to complete this approval stage. Make sure you are logged into CTIMS using the EDI State Requisition Coordinator Role.

At this approval stage, you will also need to print the required documentation and deliver to the finance department.

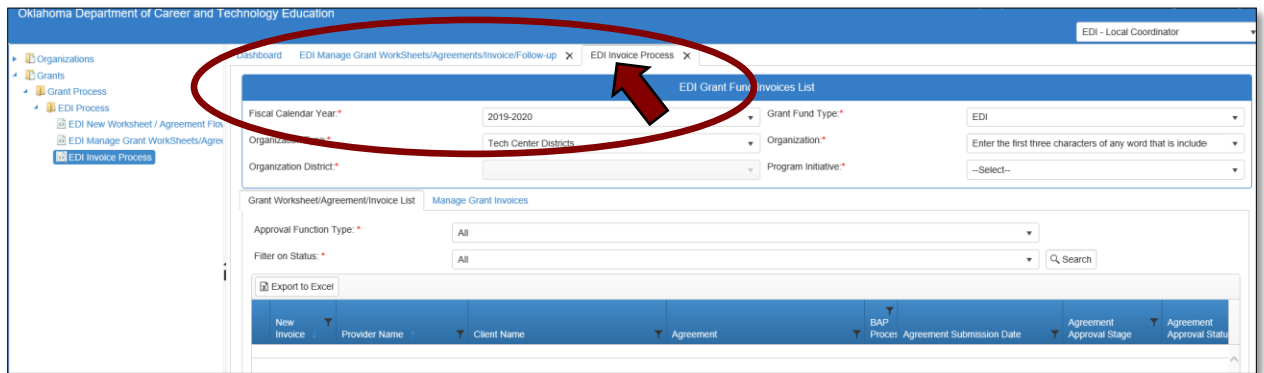
### Stage 6-ODCTE EDI Finance Reviewer



Follow the steps for the Local BIS Coordinator to complete this approval stage. Make sure you are logged into CTIMS using the ODCTE EDI Finance Reviewer Role. This is the final approval to pay the claim.

## TIPS and Tricks

### CTIMS Helpful Hints

- There are scroll bars located at the bottom and right of some of the screens in CTIMS. If you cannot see all of the information on a screen, go to the right or bottom of the screen and use the scroll bar to see navigate over to view additional columns and rows.
- You can flip between screens or tabs in CTIMS. Click on any open tab at the top of your screen to toggle between them.



- There are tabs within screens in CTIMS. Look for these tabs to view a different screen or more information. For example, within the Invoice Process, on the EDI Grand Fund Invoices List screen, there are two tabs: Grant Worksheet/Agreement/Invoice List and Manage Grant Invoices. You can flip between the two tabs within this screen.
- Many sections in CTIMS can be expanded in order to view more detailed information by clicking on the +(plus) sign or an arrow ► next to the section header or line (row).
- Hold down the Ctrl key and click on the + or – keys to zoom in or out.
- Do not use the Print icon  to print documentation. Use the save icon  to download a pdf, then you can save it to your computer or print the pdf.
- You can only have 10 tabs open at one time. To close tabs, click on the ✕ on the right side of the tab you wish to close, then confirm that you would like to close by clicking OK on the confirmation screen.

## Where's my Invoice?

To find out what approval stage your invoice is in, you can take the following steps:

- On the navigation on the left, go to Grants>Grant Process>EDI Process>then click on EDI Invoice Process.
- Complete the EDI Grant Fund Invoices List form and click Search.
- There are 2 tabs: Grant Worksheet/Agreement/Invoice List and Manage Grant Invoices. Click on the Manage Grant Invoices tab.
- You can use the scroll bar at the bottom to scroll to the right to see the Current Approval Stage column.
- Or you can click on the ► on the left, on the invoice row to view the Invoice Approval Summary. This includes approval/rejection notes.

## Where are the Funds?

- If you have created a new invoice and added a dollar amount to a line item, that amount will be subtracted from your balance on the dashboard. This includes a draft of an invoice that has not been submitted for approval.
- If \$0.00 are available in a line item to invoice, the line item will not appear on a new invoice.